



CRM Domestic Voice Representative Training

INTRODUCTION

CRM Domestic Voice training is necessary for Customer Support Representatives (CSRs). In this training the administrative user trainer trains employees to use the CRM software. It includes ways to use the software, handling the record, ways to greet a customer, voice pitch during customer call, maintain database, resolve the customer's query and give priority to customer satisfaction.

The training is normally given by outside company. They teach employees how to search through records, assign activities, deal with data workflows and create marketing campaigns. They also provide guidance on how to convert leads, create and manage service calls. These classes are typically offered online and onsite.

This training should not necessarily occur together. It can take substantial time to switch from old system to a new one because sales and data can be lost in the interim. Thus, you may want to



Fig.2.1: Introducing Own CRM Software to CSR

perform the CRM training in multiple phases. That way, the company will face less disruption of day-to-day activities while employees attend classes and the departments can be switched over one at a time.

Introductory user training usually takes a full day, with one workstation for every two students. Admin-user training takes the same time but requires a workstation for each administrator. This is so that they can get enough practical experience to deal with the templates and different relationship roles. If your company has gone with a customised CRM system, the training time is typically extended to one-and-a-half days.

PURPOSE OF THE TRAINING PROGRAMME

This training programme is developed to impart specific skills to individuals who wish to perform as a Customer Relationship Manager (CRM) Domestic Voice. The training programme is intended for imparting basic skill and knowledge. Companies that adopt a CRM system will need to properly train their employees on how to use the system. The company workers will need to know how to create leads and manage accounts, as well as make detailed reports with the software, or they won't be able to perform their basic duties.

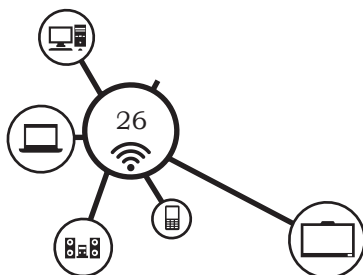


Fig. 2.2: Training Programme

You will probably want to designate around 6 to 10% of the sales force automation budget for training purposes. This may seem like more than necessary but studies have shown that companies that put sufficient funds towards training employees on the CRM system.

Trainers should note that this training does not have to be performed by the vendor that sells you CRM system. There are numerous small businesses that specialise in CRM training and offer full certification programmes for employees. Many of them can also provide special package deals for your company.

If you like, you can use in-house IT person to provide the CRM training. They will need to read on the documentation first and know how to properly manage



a CRM system. The main issue with this is that they might not be completely familiar with the software and some of its advanced features. This method tends to be much cheaper than hiring an outside company since the employee is already on the payroll.

The most important thing is that everyone receives proper training. If an employee doesn't know how to build a contact list or manage records, they can lose a potential customer. Training can help to ensure that employees know how to operate the system and the many special features that it offers.

ROLE AND RESPONSIBILITIES OF A CRM DOMESTIC VOICE REPRESENTATIVE

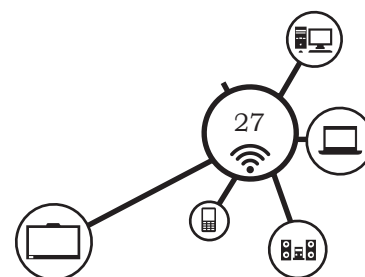
A CRM is expected to call the customer and inform them about the product and services. CRM calls the customer to get an appointment for a personal meeting by a Subject Matter Expert (SME). This SME will meet the customer and explain the entire concept, functionalities and usage of the product and services.



Fig. 2.3: Role and Responsibilities of a CRM Domestic Voice Representative

- A CRM is the voice of the company. They are the first point of contact with the customer. This makes the CRM's role very crucial.

CRM DOMESTIC VOICE REPRESENTATIVE TRAINING



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- A CRM receives and makes telephone calls that are primarily scripted and include basic questions. They are used with the assistance of a computerised system. They inform the customer about the products and services offered by the company, answer queries, resolve problems, record complaints and/or receive feedback.
- A CRM is expected to communicate with customers to market and sell the products and services of the organisation.
- A CRM is required to talk to the customers politely and professionally.
- A CRM is required to know the products and their features properly so that they can convince and persuade the customer to buy the offered product or service.
- A complete training on technical and soft skills is given to the CRM to help them achieve this.
- Every CRM has to meet certain targets given for the month or quarter.

A CRM's performance is reviewed regularly. It is a CRM's responsibility to meet the given target and fare well during the review. This is one of the key areas of a CRM's role and responsibility.

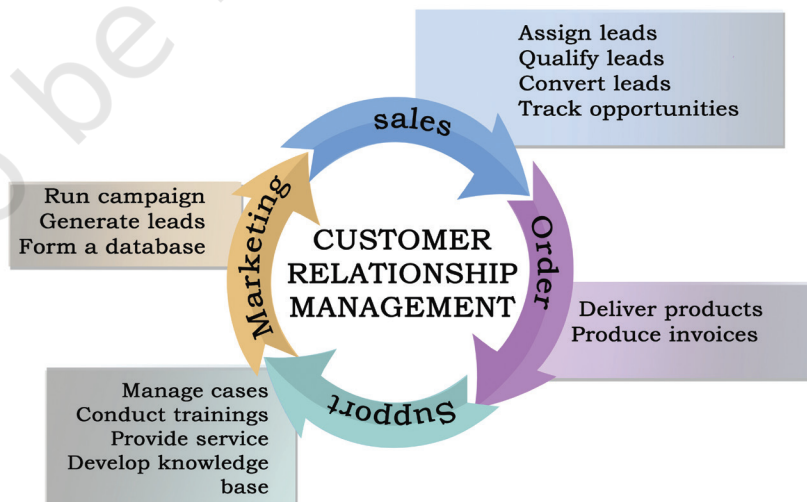
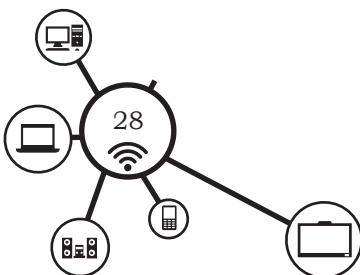


Fig. 2.4: CRM Cycle

CRM DOMESTIC VOICE – CLASS XI



A CRM is not only an individual contributor but also a contributor to the team machinery. It is crucial for them to discharge their responsibilities as a team contributor.

A CRM's role and responsibilities depend on other functions such as Human Resources (HR). HR includes planning and forecasting staff requirements and managing recruitment and selection. The HR team ensures that managers apply HR policies and procedures consistently across the business.

CRMs also heavily rely on the IT department. IT services install equipment and applications, manage databases and computer networks to provide the business with strong and effective information and communication channels.

PERSONAL ATTRIBUTES OF A CRM

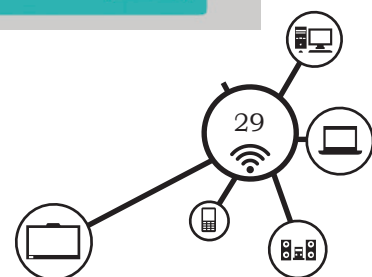
DOMESTIC VOICE

A CRM has a crucial role to perform all activities. They convince the customers to buy products over the phone with their communication skills. A lot of preparation is required before the call is made. A CRM needs to know the product, their prospects and the relevance of the product to the prospect. During a call, the CRM needs to be alert, professional and intelligent in their approach. After finishing the call, it is important to document the call with complete details. If it is not documented properly, its further processing is affected at the customers end. This results in problems.



Fig. 2.5: Independently Interact with Customers

CRM DOMESTIC VOICE REPRESENTATIVE TRAINING



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Like every job, the job of a CRM requires certain pre-requisite skills. This job requires a CRM to work independently and interact with customers. The individual should be result-oriented and should also be able to demonstrate logical thinking and inter-personal skills. They should ensure prioritisation of workload and should be willing to work at a desk-based job. It is crucial that a CRM has a positive attitude.

PROFESSIONAL SKILLS REQUIRED FOR THE ROLE OF CRM DOMESTIC VOICE

- Learning
- Communication
- Inter-personal
- Customer handling
- Time management
- Anger management
- Teamwork
- Telephone etiquette and the ability to respond professionally to clients on the telephone
- Attention to detail and the ability to follow specific instructions
- Problem solving skills over the telephone

Practical Exercise

Assignment 1

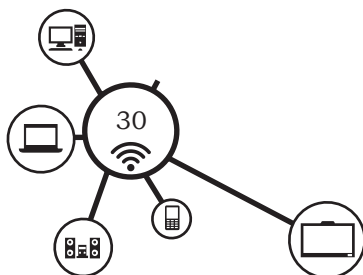
Demonstrate the training steps to insert a record in a CRM system.

Material required

Computer system, CRM software

Procedure

1. Write www.freecrm.com and enter login details.
2. Click on template.



FreeCRM.com SETUP : HELP : LOGOUT

HOME | CALENDAR | COMPANIES | CONTACTS | DEALS | TASKS | CASES | CALL | EMAIL | TEXT/SMS | PRINT | VOICE | CAMPAIGNS | DOCS | FORMS | REPORTS

Combined | New Company | New Contact | New Event | New Deal | New Task | New Case | New Call

Quick Search CRM

Dr. Marcellus Wallace

Dr. Marcellus Wallace

Templates Merge Send Text Shortlist Call List Confirm Email Call Create Event Combined Delete Log

Title Dr.
Name Marcellus Wallace
Suffix
Nickname
Company Wallace Traders
Position CEO
Department
Supervisor
Assistant
Created at Nov 13, 2012 12:26:00 AM
Last modified Nov 13, 2012 12:26:00 AM
Owner ali abbas
Identifier

Phone 321-432-867
Mobile
Home Phone
Fax
Email marcwal@mwpl.com
Email (alt.)
I.M.
Skype ID marcwal
Receive Emails Yes
Receive SMS Yes
Allows Calls Yes
Source Walk in
Referred By
Birthday Nov 22, 2013
Status
Category Key Contact

Notes/Description
Wallace came to our office yesterday and showed interest in our services.

Tags
ceo, contact

Local time and time zone
Nov 15, 2012 9:23:25 AM US/Pacific - Pacific Time

Email campaigns
N/A

Promotion codes

Addresses

Billing Address
Main Office (Default address)
123, 5th Ave

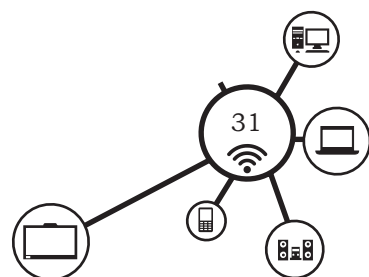
Have the group work in pairs and discuss each of the following:

1. Products and services offered by the company
2. Recording complaints and receiving feedback

Check Your Progress

A. Multiple choice questions

1. While making a call, a CRM should speak with a customer _____.
(a) professionally
(b) casually
(c) rudely
(d) loudly
2. A CRM is the _____ of the company.
(a) face
(b) voice
(c) support
(d) employee
3. After finishing a call, the CRM should _____.
(a) complete the documentation process
(b) take a break



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- (c) toast about it to the Team Leader
- (d) go home
- 4. A complaining customer is _____.
 - (a) often right
 - (b) always wrong
 - (c) often lying
 - (d) always right
- 5. Who is a good customer service professional?
 - (a) Customer service professionals who do not provide a friendly voice; they are rude and refuse to help.
 - (b) Good customer service professionals who provide a friendly voice and face to the company while solving problems.
 - (c) Good customer service starts with how you treat every customer as valuable.
 - (d) Good customer service notes down the customer's problem.

B. Short answers question

1. List the roles and responsibilities of a CRM Domestic Voice Representative.
2. What are the professional skills required for a Customer Service Representative?
3. What are the professional skills required by a CRM Domestic Voice Representative?

